

BIDS SHALL BE PUBLICLY OPENED AT 11:00 A.M., PREVAILING WASHINGTON, D.C. TIME, ON OCTOBER 22, 2012.

IF YOU HAVE ANY QUESTIONS CONCERNING THESE SPECIFICATIONS CALL (202) 512-1239 AND ASK FOR FRANK YATOR (AST #2). NO COLLECT CALLS.

BID SPECIFICATIONS - U.S. Government Printing Office (GPO), Washington, D.C.

GPO CONTRACT TERMS: Any contract which results from this Invitation for Bid will be subject to GPO Contract Terms (GPO Publication 310.2, effective December 1, 1987 (Rev. 6-01)) and Quality Assurance Through Attributes Program for Printing and Binding (GPO Publication 310.1, effective May 1979 (Rev8-02)).

“DISPUTES: GPO Publication 310.2, GPO Contract Terms, Contract Clause 5. Disputes, is hereby replaced with the June 2008 clause found at www.gpo.gov/pdfs/vendors/contractdisputes.pdf. This June 2008 clause also cancels and supersedes any other disputes language currently included in existing contractual actions.”

SPECIFICATIONS FOR CONTRACT PRINTING AND BINDING OF THE TFOP INSTRUCTIONS (LESS THAN FULL CARTONS--CONTRACT 1) FOR TAX YEAR 2012

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SCOPE: These specifications cover the printing and binding of **THREE** different self-covered pamphlets (one 208 pages; one 92 pages; and one 44 pages) with a total quantity of approx. 900,982 pamphlets, mailing/shipping to approx. 6,000 destinations that will require packing into approx. 15,301 total cartons (approx. 11,391-- ½ cartons; approx. 3,910 -- ¼ cartons); and include addressing, labeling, palletizing, storing; staging, and mailing/shipping Parcel Select/Small Package Carrier (SPC).

NOTE: Due to the numerous exhibit pages in this specification, the exhibits will not be accessible via the Internet. A complete copy of the specifications including exhibit pages may be obtained by contacting the bid room @ (202) 512-0526.

CHANGES IN PAGE COUNTS: Pages counts may vary when the print files are received. The contractor must submit a price per thousand that the Government can decrease/increase the purchase order price by for each Item based on the final page counts and final quantities. **See Offers Section 8.2, 8.2.1, and 8.2.2.**

CHANGES IN QUANTITY: The Government, for the FINAL QUANTITY, may submit increases or decreases of up to 25% in the total quantity for each item until the date specified in the schedule. These quantity adjustments may be made via email and will be the FINAL quantity. These adjustments will not change the scheduled turnover dates. Regardless of page counts, billing adjustments for scheduled quantity changes (+ or -) will be at the contractor's quoted "ADDITIONAL RATE". **See Offers Section 8.3.** If no changes have been received by the scheduled date for final quantity adjustments, the bid quantities will stand as the FINAL contract quantity.

NOTE: Must be full Final Quantity to all consignees. No shortages will be allowed. However, the Government reserves the right to accept or reject overages.

SUBCONTRACTS: The provisions of the article entitled "Subcontracts," GPO Pub 310.2 is amended to permit subcontracting of label printing. NOTE: Prime contractor is responsible for monitoring and the quality of the work performed by subcontractors.

Section 1 - SCHEDULE

<u>Date</u>	<u>Event</u>
10-22-2012	Bid opening.
10-29-2012	Award of contract (Purchase Order Number by Telephone).
11-07-2012	Test address file to contractor via email (see Section 2.1).
11-09-2012	Quality Systems Plans due from the contractor (see Section 6).
Negotiated	Preproduction Conference at contractor's plant or via telephone (see Section 1.2).
11-15-2012	Final address files furnished to contractor via email (final quantity).
12-14-2012	PDF print repro for EACH item to contractor via email.
01-28-2013	Start to mail/ship date. (On or before)
02-04-2013	Ship/mail complete date. (On or before)
02-07-2013	UPS manifest including a "TRACK IT" link and copies of Form 13456 and all related postal paperwork must be furnished from the contractor via email.

The Government will attempt to meet the schedules as stated in these specifications. However, uncontrollable circumstances such as Congressional Legislation may delay the furnishing of printing media. In such event, the schedule will be adjusted in accordance with contract terms.

Unscheduled material such as shipping documents, receipts or instructions, delivery lists, labels, etc., will be furnished with the order or shortly thereafter. In the event such information is not received in due time, the contractor will not be relieved of any responsibility in meeting the shipping schedule because of failure to request such information.

1.1 Pre-award Plant Survey: may be conducted by the Government Printing Office and/or the Internal Revenue Service

personnel to determine if the prospective contractor (and the subcontractors) has adequate facilities and expertise to accomplish the requirements of these specifications.

1.2 Preproduction Conference: A preproduction conference may be held at the contractor's plant or via the telephone as indicated in the schedule. The purpose of the conference will be to discuss and review all aspects of the contractor's internal and external operations required to complete this contract. The contractor will conduct this preproduction conference and items to be discussed are:

- 1) Processing and sorting electronic address files, as well as the security of the address files
- 2) **FOR EACH ITEM** (total of 3 items)---Scheduled start-up dates for all phases of production
- 3) Coordination/communication from one production phase to another
- 4) Who will be responsible for each phase
- 5) How will subcontractors be involved and kept informed
- 6) Specific production dates of all subcontractors
- 7) How the product will be staged and/or shipped
- 8) Any other special requirements which are specific to this contract.

Attending this meeting will be representatives from the Internal Revenue Service and there MAY be representatives from the Government Printing Office. To establish coordination of all required operations, a representative of all subcontractors involved should also be present as well as representatives from each involved production area for the primary contractor.

1.3 Quality Systems Audit: In connection with the preproduction conference, should the Government elect, a quality systems audit would be conducted. Following the conference, IRS/GPO may conduct an in-depth audit of all contractor quality control methods, quality systems and quality plans in a formal walk-through. This audit would require the contractor to plan, in advance, all quality related functions which would be required to complete the contract. Should subcontractors be involved, a complete audit of their quality systems may also be performed.

Failure to maintain the quality systems in accordance with the contractor's plan approved by the Government may result in the Government's termination of the contract for default.

1.4 Inspection Notification: Seventy-two (72) hours prior to press, binding, mailing/shipping, the contractor must e-mail to Betty.J.Howard@irs.gov and Theresa.L.Skyrm@irs.gov. Form 9558 "Quality Inspection Notification" (Fillable PDF to be furnished to the contractor, **see Exhibit 1**) with the following information:

- 1) Jacket and Requisition Numbers
- 2) Name of company
- 3) Location and address of inspection site
- 4) Name and phone number of contact person
- 5) Date and time of inspection

Whether IRS elects to be present for the inspection, or waive the inspection, you will be notified at least 24 hours prior to the time for inspection. If IRS fails to respond, proceed as you would have, had there not been an inspection. **If the press inspection is waived, the contractor is required to send 5 press sheet samples overnight to IRS, Attn: Terri Skyrms, 5000 Ellin Road, Room C7-220, Lanham, MD, 20706.** Attendance at, or waiver of, the inspection does not affect any other provisions of the contract. Do not hold up production unless specifically authorized by the GPO.

1.5 Daily Production/Mailing Report: For **Each** Item (see Section 3), the contractor must provide daily production including mailing and shipping information on Form 9659 "Production and Mailing Report" (**see Exhibit 2**). The IRS In-Plant Liaison(s) will transmit this form every workday, by 11:00am (EST) to IRS National Office via Internet. **In the absence of the In-Plant Liaison, the contractor must email Form 9659 to Theresa.L.Skyrm@irs.gov.**

1.6 Electronic Distribution/Shipping List (Form 2040): Electronic Form 2040 is used for the purpose of updating IRS' databases. The contractor **MUST** update the Electronic Form 2040 "Distribution/Shipping List" (**see Exhibit 4**) and transmit via e-mail to the IRS each day the products ship. It is the contractor's responsibility to update the Shipping status, Number of Copies Shipped, and Date Shipped fields as per instructions included in Form 2040 pdf. **Any delay or missed input could result in delay of payment.** The contractor is responsible for the verification and correctness of information supplied back to IRS. If any information is missing or incorrect, please contact Terri Skyrms at 202-283-4912, or email Theresa.L.Skyrm@irs.gov.

1.7 Final Shipping Notification: Contractor must submit via email, shipping notification on the final day of shipping Jacket

371-069 complete. Email the notification to Theresa.L.Skyrm@irs.gov

SECTION 2 – MATERIALS

2.1 Furnished by the Government:

- 1) PDF files for Forms generated from Adobe Acrobat 9.0 or later (We will supply a color composite PDF file, and all fonts will be embedded in the files at the PDF level). **Do not unembed fonts!** This may result in a loss of data. The PDFs are backward compatible to Adobe Acrobat 8.0.
- 2) Electronic distribution list in comma delimited (.csv) format via e-mail.
- 3) IRS Carton label for each item in pdf format via email.
- 4) Government Bills of Lading via email.
- 5) Form 13456, “IRS Publishing – Postage Report”
- 6) Form 2040 (Distribution/Shipping) in a PDF fillable Adobe Acrobat 6.0 file format provided via e-mail.
- 7) Forms 9558 (Inspection Notification Report) and 9659 (Commercial Production Report) in fillable pdf format
- 8) USPS Form 3615, Mailing Permit Application and Customer Profile (if required).
- 9) SPC IRS Account Number (if required).

Distribution Files: Files are created in a comma delimited (.CSV) format (see **Exhibit 9**). The contractor must import text from the furnished .CSV file (s) into their own software program to create mailing/shipping addresses and labels. See Section 4.3---LABELING/ADDRESSING.

NOTE: When a destination is receiving copies of multiple Items, a separate line for each Item will appear in the file.

Postaward Test: IRS will furnish a file via e-mail consisting of approximately 10 records. Within two (2) workdays after receipt of test files, the contractor must submit the 10 records in the appropriate address label formats furnished in **Exhibits 3A, 3B, 3C, & 7**. Test samples must be emailed to Theresa.L.Skyrm@irs.gov. Contractor will receive an approval/rejection via email of the test samples within two (2) workdays after receipt of email. If samples are rejected, contractor must submit additional samples for approval within one (1) workday. **NOTE:** No additional time will be allowed in the schedule when additional samples are required due to contractor’s errors.

2.2 Furnished by the Contractor: All other materials and operations necessary to fulfill the contract requirements.

For completing Form 2040 “Electronic Daily Distribution/Shipping Report”, the contractor is required to have Internet access provided through an Internet Service Provider (ISP), an email account and a web browser equivalent to Internet Explorer 6.0. **In addition, the contractor is required to have Adobe Acrobat 8.0 (or higher) software (not Adobe Reader).**

Prior to image processing the contractor is responsible for checking files to insure that such features as bleeds, register marks, and correct file output selection have been provided for, so as to correctly output for printing. The contractor must supply necessary trapping. High-resolution image processors must be used if generating films.

The contractor must furnish no more than **TWO (2) email addresses** to which all government furnished material is to be sent.

2.3 JCP Standards: The specifications of all papers furnished must be in accordance with those listed herein or listed for the corresponding JCP Code numbers in the "Government Paper Specification Standards No. 12" dated March 2011.

Items (A) thru (C) - - White or Natural (MUST be light shade) Newsprint, basis weight: 28lbs. per 500 sheets, 24 x 36", must equal JCP Code A10. **NOTE:** All text paper within a single copy must be of a uniform shade. The weight of the newsprint paper must remain constant throughout the entire run for **all** items.

2.4 Postage Statements/IRS Postal Forms: The contractor must complete and submit via email a portable document file (PDF) to the IRS within three (3) workdays after the final turnover of mail packages to the USPS (see **Exhibit 5**). The PDF should be sent in a single email when possible and the total file size of the e-mail must be under 10 MB. If the size is 10 MB or larger, then multiple emails must be used. E-mail the PDF to postage@publish.no.irs.gov and to Theresa.L.Skyrm@irs.gov. For your convenience, Form 13456 is provided as a fillable PDF file. The IRS will complete the fields, in the “IRS Use Only” section of the form prior to e-mailing the form to the contractor. If there is any information missing or incorrect, please contact Terri Skyrn at (202) 283-4912, or email Theresa.L.Skyrm@irs.gov.

The PDF to be submitted to the IRS must include Form 13456 and all related postal paperwork that has been combined into a single PDF (**see Exhibit 6**). Scanning Form 13456 is **NOT ALLOWED**. Please fill out the provided PDF file for Form 13456, add the postal paperwork (which can be scanned) to the PDF file, save it and submit it to IRS.

The contractor is responsible for capturing five data elements from every postage statement (i.e. USPS Form 3602, 3602-R, 3600, 3605, etc). The five elements are: (1) post office zip code, (2) postage statement date, (3) total pieces mailed, (4) postage amount, and (5) postage statement type. **The form must contain only postage information for the designated IRS requisition number.**

Prior to emailing the combined PDF file, the contractor must rename the file. The file should be named using 9 digits of the Requisition Number, Post Office Zip Code, (first) Mailing Date, (last) Mailing Statement Date and .pdf (see below). In the event that both mailing statement dates are the same, the first and last dates in the file name can also be the same.

Examples: For requisition number 2010-12345, the file name will be: 2010-12345_16625_01-02-10_01-15-10.pdf

If the file size is 10MB or larger, the contractor must create multiple PDF files and add a suffix to the file name starting with the letter “a” then “b”, etc. (i.e. 2010-12345_16625_01-02-10_01-15-10a.pdf). The contractor is also responsible for the accuracy of the information returned to the IRS. **Any delay or missing data could result in a delay of payment.**

- All Postage Statements (i.e. USPS Forms 3600s, 3602s, 3605s and USPS Form 8125, PVDS) must contain the IRS Agency Cost Code “**67039**” in the “Federal Agency Cost Code” box. **The GPO Jacket Number must be included in the mailer information located in the upper portion of the postage statement.**

The email must contain only postage statements for the designated requisition number. Contractor must not combine postage associated with multiple print order/requisition numbers in a single email transmission.

The contractor must complete Form 13456 per the supplied instructions on the form and fill in the following fields: Name of contractor, Contact person at contractor, Telephone number of contact person, e-mail of contact person, Number of pages in the combined email, Date the email was sent, and the Wave/Phase Number. **The Wave/Phase number is used to show the number of mailings in the event of staggered shipments for one requisition.**

SECTION 3 – INSTRUCTION SPECIFICATIONS:

3.1 Items:

<u>Item Number</u>	<u>Item Name</u>	<u>Catalog Number</u>
(A)	I 1040 ALL	11325E
(B)	I 1040 A	12088U
(C)	I 1040 EZ	12063Z

3.2 Quantity (estimated):

Item	(A)	75,000
Item	(B)	270,972
Item	(C)	555,010

3.3 Trim Size (all Items): 8 x 10-7/8”.

3.4 Number of Pages (estimated): The page count below for each item is approximate and subject to change. See SECTION 8 “OFFERS” (BIDS).

Item (A): 208 pages
Item (B): 92 pages
Item (C): 44 pages

3.5 Printing (all Items): Print head-to-head, in **Black** ink. Halftones may be scattered throughout and must be 110-line screen or finer.

3.6 Binding (all Items): Saddle-wire stitch in two (2) places on the 10-7/8” left side and trim three (3) sides. At contractor’s option, single leaves connected with a lip (i.e., binding stub) to the left or right side of stitches will be allowed, provided the lip does not extend past the bind margins of the adjacent pages.

3.7 Margins (all Items): ½" head, unless otherwise stated; center left and right.

3.8 GPO Imprint: Contractor must set and insert a GPO imprint line on each copy, in accordance with GPO's Contract Terms.

3.9 Electronic Proofs: Contractor must email one (1) set of electronic page proofs for **EACH** Item to Theresa.L.Skyrm@irs.gov as soon as the contractor deems necessary in order to comply with the shipping schedule in the contract. Email must include the Jacket and Requisition Numbers. Electronic proofs must indicate margins, final trim size, and include all images in proper positions. Proofs will be evaluated for image position, pagination, and trim size. In addition, contractor must call GPO Contract Compliance Section at (202) 512-0520 immediately upon emailing proofs to the IRS and upon receiving the "OK TO PROCEED" email back from the IRS. **CONTRACTOR MUST NOT PRINT PRIOR TO RECEIVING AN "OK TO PROCEED"**. Proofs will be withheld not more than three (3) workdays from receipt in the IRS to receipt via email in the contractor's plant.

SECTION 4 – PACKING/LABELING/ADDRESSING:

4.1 Packing: Pack each ITEM separately in **mailing/shipping cartons**. Pack cartons in 2 even stacks, in specified quantities per carton. Quantities per carton will be indicated on the IRS Parcel Post furnished carton label and/or distribution list. No internal wrapping or tying. All mailing/shipping cartons must adhere to the IRS, U.S. Postal Service (USPS) and Small Package Carrier (SPC) current labeling/packing requirements.

ITEM A (I 1040 All): Pack approximately 75,000 (total copies) into approx. 3,125 -- ½ cartons (approx. 24/carton).

ITEM B (I 1040 A): Pack approximately 270,972 (total copies) into approx. 5,211 – ½ cartons (approx. 52/carton).

ITEM C (I 1040 EZ): Pack approximately 555,010 (total copies) into approx. 6,965 cartons. **Approx. 336,050 copies pack into approx 3,055 -- ½ cartons, and pack 110/carton. Approx. 218,960 copies pack into approx. 3,910 – 1/4 cartons and pack 56/carton.**

4.2 Cartons: Contractor must furnish various sizes of double-ream corrugated or solid fiber mailing/shipping cartons, 1380 kPa (200 psi) minimum bursting strength and minimum edge crush strength of 35 psi. **Carton sizes must reflect the length, width, and depth/height of the pamphlets contained within. Pamphlets must not shift within the carton, or arrive at destinations damaged.** Bottom flaps may be glued or sealed with polyester tape 2 to 3" width, minimum 12 kNm (65 lbs./inch) transverse tensile strength).

Cartons are to be sealed at top with 2 to 3" paper or polyester tape (not reinforced). Cartons are to be securely sealed and suitable for handling during mailing/shipping. Cartons must not open nor split when processed through the USPS or SPC delivery systems. Pack all cartons **SOLID** (allow for compression).

NOTE: Contractor **must not** use any type of packing filler inside cartons.

4.3 Labeling/Addressing: From the furnished distribution file the contractor must create address labels or image/print directly on contractor created SPC labels and IRS furnished (Form 6153-A)USPS Parcel Select labels. See additional labeling/addressing requirements in **Sections 4.3.1 and 4.3.2.**

NOTE: All USPS addresses/destinations **MUST** mail Parcel Select. **Non USPS addresses** containing only a P.O. Box in the distribution file **MUST** mail Parcel Select. However, if **non USPS** address contains a P.O. Box and a street address in the distribution file, the contractor must disregard the P.O box and **the street address must appear on the address label and ship via small package carrier.**

CAUTION: In the event that labels are not securely affixed to the cartons and/or contain incorrect information they will be considered mislabeled. Also, if the mailing/shipping cartons are crushing, collapsing, and/or bursting, and it is determined that the cause is due to the cartons not being packed solid, or some other reason within the contractor's control, the contractor will be responsible for relabeling and repacking. All costs will be borne by the contractor.

In addition to the information stated in Sections 4.3.1 and 4.3.2, the distribution file will contain a separate line for each item an address is going to receive (each address will contain from one to three lines).

Contractor must include the following return address on all Parcel Post and SPC carton labels:

Internal Revenue Service
National Distribution Center
1201 N. Mitsubishi Motorway
Bloomington, IL 61705-6613

4.3.1 SPC Shipment Labels: Currently, IRS's utilizes UPS as the SPC. Contractor must affix a completed UPS label to the top of each carton. Contractor **MUST** generate UPS shipping labels electronically. It is the responsibility of the contractor to be familiar with electronic shipping methods via UPS. There are many ways to generate electronic shipping labels, either through a UPS shipping system (UPS WorldShip System or UPS Internet Shipping) or a 3rd Party Shipping Software (Pitney Bowes Shipping Software, etc.). Contractor will be responsible for entering the following information on each label: NDC, Bloomington, IL return address, Consignee's Account Number (i.e. TF123456A); Consignee's Name and Address, Consignee's Contact Person and Telephone Number; and identify the carton number (i.e. 1 of 1, or 1 of 2, 2 of 2, etc) on each label (see Exhibit 7).

In addition to addressing requirements, UPS shipping systems provide five (5) reference fields below that are required to be completed by the contractor (see Exhibit 7):

1. *Reference Field 1:* Government Printing Office (GPO) Jacket number, and
2. *Reference Field 2:* IRS Print Requisition Number
3. *Reference Field 3:* Program name – TFOP
4. *Reference Field 4:* Name of product enclosed (i.e. Instruction 1040 All, Instruction 1040A, or 1040EZ)
5. *Reference Field 5:* Quantity of product enclosed

4.3.2 IRS Parcel Post Carton Labels (Form 6153-A): All cartons shipping via USPS require an IRS furnished Parcel Post carton label. Contractor will be furnished an IRS mailing carton label for EACH ITEM. See Exhibits 3A, 3B, & 3C. Carton labels must be generated from the IRS furnished pdfs. Contractor's streamlined or recreated labels will not be acceptable. Contractor must reproduce carton labels as necessary on white stock. The contractor must image/print in black ink with a minimum 12 point sans serif type. Contractor will be responsible for entering the following information on EACH label: NDC, Bloomington, IL return address; Consignee's account number (i.e. TF 123456A); Consignee's name and complete address (no exceptions); Delivery Point Barcode/Intelligent Mail barcode (IMb) created by contractor and per the Domestic Mail Manual at time of mailing; Identify the carton number (i.e. 1 of 1, or 1 of 2, 2 of 2, etc) on each label; and affix the **appropriate** IRS Parcel Post carton label to (must reflect the carton contents) to one end of each carton (never on top, long-side, or bottom).

4.4 Intelligent Mail Barcode: Contractor must be an approved USPS Intelligent Mail Barcode (IMb) provider and supply an approved copy of their IMB Mailer ID Application to verify status. Contractor must meet all IMb preparation and postage documentation requirements as required in the Domestic Mail Manual. **All mail must be presented under the contractor obtained Mailer ID (no exceptions).** Contractor shall sort mail to effectively maximize all USPS eligible discounts.

4.5 Copies Damaged in Transit: CONTRACTOR MUST REPLACE AND SHIP/MAIL ALL COPIES DAMAGED IN TRANSIT WITHIN 24 HOURS OF DEFICIENCY NOTIFICATION, VIA OVERNIGHT DELIVERY. CONTRACTOR WILL BE NOTIFIED OF THE DEFICIENCY VIA EMAIL. CONTRACTOR WILL INCUR ALL CHARGES TO REPLACE AND SHIP/MAIL DAMAGED COPIES.

4.6 IRS In-Plant Liaison(s): One or more IRS representatives may be stationed at the contractor's and/or subcontractor's facility to monitor production, quality sampling, mailing and distribution. The liaison will bring any defects they see to the attention of the contractor's Quality Control Officer. **However, they do not replace any of the contractor's quality control responsibilities.** The contractor must make contractor pulled samples available to the IRS liaison for review. In addition to the contractor samples, the liaison will pull samples from each production line throughout the day. These samples are outside the scope of any contractor sampling and must be captured as spoilage and replaced for mailing. The contractor must maintain storage of all samples for a warranty period of 120 days. The In-Plant Liaisons will have full and unrestricted access to all production areas where IRS work is being produced. The contractor must furnish office space to include desk, chair, and telephone, personal computer with CD drive and internet access to send and receive email. The personal computer must be loaded with the full suite of Adobe 8 software. The contractor will provide access to a facsimile machine and barcode scanner to read postal barcodes. This space must be enclosed, secure and adjacent to the binding operations. The contractor will provide copies of all production and mailing reports to the IRS liaison on a daily basis.

Production Interruptions: Anytime equipment, materials, or personnel interruptions occur (equipment down, web break, roll changes, shift changes, etc.), the on-site In-Plant Liaisons must be notified immediately. The In-Plant Liaison(s) will observe the last correct piece prior to the interruption, the destruction of all spoiled pieces, and the first correct piece back in production.

SECTION 5 – DISTRIBUTION (MAILING/SMALL PACKAGE CARRIER:

Mail/Ship f.o.b. contractor's city via Parcel Post/SPC.

NOTE: *Destinations furthest from contractor's shipping location must ship/mail first; destinations closest to contractor's shipping location must ship/mail last.*

The distribution file furnished by IRS will contain a suggested transportation mode for each address/destination. These modes consist of Domestic Mail (DM), Small Package (SC), Freight (TL), and Air Freight (AF). **See Exhibit 9** for an overview of fields that will be included in the distribution files.

If there is a discrepancy between the suggested transportation mode indicator in the furnished distribution files and the contract specifications below, contractor must immediately notify Terri Skyrn @ (202) 283-4912 for resolution prior to shipping. **NOTE:** If contractor ships or mails incorrectly, contractor will borne all additional costs incurred by the Government.

The following transportation modes apply:

- All addresses containing P.O. Boxes (no street address furnished in the excel file), APO, FPO, and all US Post Office locations **must mail via USPS Parcel Select** (transportation mode "DM"). **NOTE:** When a street address and P.O. Box both appear within the same line in the furnished excel file, the contractor must utilize the **street address** and ship via Small Package (transportation mode "SC"). If the contractor utilizes a SC for US Post Office/APO/FPO destinations or an address containing a P.O. Box only, **all costs incurred by the Government will be borne by the contractor.**
- All non-expedited (ground) shipments weighing less than **750 lbs. (except addresses containing a P.O box only, APO, FPO, and all USPS destinations)** to one destination within the 48 contiguous states, Alaska, Hawaii or Puerto Rico will be sent via small package carrier ground services.
- Expedited (air) shipments weighing less than **500 lbs.** to one destination within the 48 contiguous states, Alaska, Hawaii or Puerto Rico will be sent via small package carrier 2nd Day air services.
- International packages weighing less than 500 lbs. to one destination will be sent via small package carrier WorldWide Express services.
- The current small package carrier for Internal Revenue Service (IRS) is United Parcel Service (UPS).
- All non-expedited shipments weighing **750 lbs.** (except for USPS drop shipments and Priority Mail) or more to one destination within the 48 contiguous states will be sent via an Internal Revenue Bill of Lading (IRBL).
- Expedited shipments weighing **500 lbs. or more** to one destination within the 48 contiguous states or outside the 48 contiguous states will be sent via an Internal Revenue Bill of Lading (IRBL).
- All shipments outside the 48 contiguous states weighing **500 lbs. or more** to one destination will be sent via an Internal Revenue Bill of Lading (IRBL).
- In determining whether a shipment should go freight, pallet weight must be included in weight calculations.

NOTE: The Government will notify the contractor when expedited shipments are required.

5.1 Mailing (suggested transportation mode "DM"): The contractor must comply with all U.S. Postal Service regulations/requirements governing Parcel Post rate mailings which are in effect at the time of the mailing, including the issuance of the required USPS forms (mailing statements), etc. **See Exhibit 8.**

5.2 Priority Mail Shipments: If required, a carton label will be provided for any cartons which must be shipped priority mail. The contractor must print the necessary quantity of priority mail labels required. Priority mail labels must be affixed to the top of each carton. Hand stamping of priority mail cartons is unacceptable.

IRS priority mail must be entered/delivered in/to the contractor's local post office for mailing. Contractor will provide

manifests for delivered permit mail labels. The contractor must prepare the appropriate postal service forms for turnover to the local postal authorities.

5.3 Small Package Carrier Shipments (SPC) (suggested transportation mode “SC”): Currently, the IRS’ is utilizing UPS as the small package carrier.

Excluding USPS/APO/FPO destinations, if an address contains a P.O. Box and a street address, **the street address must appear on the address label and ship via SPC or Motor Freight.**

The IRS will provide an IRS small package account number. Contractor must notify Terri Skyrms at 202-283-4912, at least 10 workdays prior to the first scheduled ship date to ensure a carrier account number has been established, and/or is valid. If there is any uncertainty concerning the instructions for small package carrier shipments, the contractor must call Terri Skyrms @ 202-283-4912, prior to the first ship date for clarification. One portion of the carrier tracing label will be required to be affixed to the left of the address label of each carton. **The shipper receipt portion of the tracing label must contain a complete street address.**

If multiple small package carriers are to be used, an account number will be assigned for each carrier. Contractor is required to ship using the IRS designated carrier(s) and the assigned account number(s) or be responsible for any additional shipping costs. **Contractor will assessed all charges incurred by the Government when cartons are shipped incorrectly.**

Contractor is required to use a two-part manifest shipping report for each carrier that includes both a summary page and detailed shipping pages. The summary page is compiled using the information from the detailed shipping pages. The summary page must include the following information: 1) ship date; 2) shipper name; 3) complete address; 4) account number; 5) requisition number; and 6) totals for number of pieces and weight categorized by zone with grand totals for each. The detailed shipping pages should include the following information for each package listed: 1) consignee name; 2) complete consignee address; 3) zone; 4) weight; and 5) the matching shipper receipt portion of the traceable label. The original copy of the report should accompany the shipment.

The contractor's must notify the small package carrier of the amount to be picked up in order for the carrier to provide adequate equipment for the pick up.

NOTE: When an email address is present in the shipping file, the contractor is required to send a same-day email notification of the shipment to the email listed. The product short title must be included in the body of the ship notification generated from the SPC shipping system. The SPC tracking number and a link to the SPC website must also be included in the email (see **Exhibit 10**). All returned e-mails must be set to automatically forward to an IRS e-mail address to be specified.

Within three (3) workdays of shipping complete, the contractor must email one copy of the UPS shipping manifest including a “TRACK IT” link for each destination to: Theresa.L.Skyrm@irs.gov.

Air Shipments (if required): Shipments destined outside the Continental United States must be made via the SPC air service. **Unless otherwise stated,** UPS Air Express – Next or Second Day delivery must be utilized for air shipments weighing less than 500 lbs. IRS will furnish air bills for shipments weighing 500 lbs or more.

The contractor must contact the designated air freight carrier to coordinate all air shipments and ensure that pallets are accepted and that the maximum pallet weight is within that specific carrier’s allowable weight limit. This must be done for each air shipped destination. This will alert them to any restrictions the designated airport may have, especially if it is a small airport with limited floor-weight capacity.

SECTION 6 – QUALITY ASSURANCE:

The prime contractor shall submit, in duplicate, written outline plans of the Quality Systems and copies of the forms by the date in the schedule in Section 1. The plans shall be submitted to: IRS, Attn: Terri Skyrms, C7-220, 5000 Ellin Road, Lanham, MD 20706; and U.S. Government Printing Office, Attn: Frank Yator, (AST 5), Room C-829, 732 North Capitol St., NW, Washington, D.C. 20401. Quality Systems Plans are subject to Government approval.

6.1 Quality Systems Plan: The prime contractor shall initiate, prior to start-up and maintain throughout the life of this contract, Quality Systems to assure conformance to all requirements of this contract. The Quality Systems should be documented in a Quality Systems Plan. The plan should also address what actions will be initiated when defects are detected.

- The Quality Systems shall assure the quality of components from subcontractors and subsidiary plants. This

element includes assuring that components from different sources will be compatible BEFORE the start of production.

- The Quality Systems shall include procedures assuring that all variable data is accurately and completely printed, and all addressed items are mailed. These procedures shall explicitly describe the methods to be used to assure that no records are missed or duplicated when an interruption of variable printing occurs (e.g., due to equipment malfunction).

6.2 Quality Systems Official: The prime contractor shall designate an official who shall monitor and coordinate the quality system. This official shall serve as the Government's single point of contact on quality matters during the life of the contract. The name of the official shall be provided in the plan along with title, position, and telephone number.

6.3 Records: Records of tests, inspections, and critical process controls shall be time stamped and maintained on file. The records must be made available to the GPO and/or IRS inspector until the expiration of the warranty period of this contract. Copies of the forms used to record the inspections and test results shall be submitted with the plan. All quality control samples must be produced at no additional cost to the Government.

6.4 Inspection by the Government: The right of the Government to make general or specialized tests and inspections DOES NOT RELIEVE THE CONTRACTOR OF ANY RESPONSIBILITY. Performance of all elements and functions of the Quality Systems shall not relieve the contractor of responsibility for meeting all requirements in this contract.

6.5 Quality Assurance Levels and Standards: The following levels and standards shall apply to these specifications:

Product Quality Levels:

- (a) Printing Attributes -- Level III.
- (b) Finishing Attributes -- Level III.

Inspection Levels (from ANSI/ASQC 21.4):

- (a) Non-destructive Tests -- General Inspection Level I.
- (b) Destructive Tests -- Special Inspection Level S-2.

Specified Standards: The specified standards for the attributes requiring them shall be:

<u>Attribute</u>	<u>Specified Standard</u>
P-7. Type Quality and Uniformity	O.K. Press Sheets
P-9. Solid and Screen Tint Color Match	O.K. Press Sheets

Special Instructions: In the event that inspection of press sheets is waived by the Government, the following listed alternate standards (in order of precedence) shall become the Specified Standards:

- P-7. Government furnished electronic files
- P-9. Pantone Matching System.

6.6 Compliance: To monitor compliance, one or more quality assurance inspections of the forms may be conducted by Government Printing Office and/or Internal Revenue Service personnel.

SECTION 7 – PRODUCTION SAMPLES:

The copies included in A and B, are to be considered sample copies and will not be included in the quantity ordered and may not be included in the quantity billed. Shipping of these samples must be **at the contractor's expense**, and must be sent overnight and by traceable means. **Contractor must not include these copies on IRS Forms 2040 and 9659.**

A. Departmental Random "Blue Label" Copies: The contractor MUST submit 600 departmental random copies (200 each of Items (A) thru (C)) at the completion of production, to test for compliance against specifications. The contractor must divide their total quantity of each Item into equal sublots and select 1 copy from a different general area of each subplot. The contractor will be required to execute the "Certificate of Selection of Random Copies", furnished by GPO, certifying that copies were selected as directed.

These randomly selected copies must be packed separately and identified by a special Government-furnished Blue label, affixed to each affected container. Additional labels, if needed, are to be reproduced on **Blue** stock. The container and its contents shall be recorded separately on all shipping documents and sent to **Internal Revenue Service, National Distribution**

Center, 1201 N. Mitsubishi Motorway, Bloomington, IL 61705-6613. Submit a copy of the SPECIFICATIONS and the signed Government-furnished "Certificate of Selection of Random Copies", along with the Departmental Random Copies.

B. IRS Samples: Send 5 copies each of Items (A) thru (C) within 3 workdays after press startup to: IRS, Room C7-220, Attention: Terri Skyrn – SE:W:CAR:MP:P:W:T, 5000 Ellin Road, Lanham, MD 20706.

SECTION 8 – OFFERS (BIDS):

Offers must include the cost of all materials and operations for the total quantity ordered in accordance with these specifications.

BILLING ADJUSTMENTS DUE TO SCHEDULED QUANTITY CHANGES (+ or -) AND THE SUBTRACTION OF UNDELIVERABLES WILL BE AT THE CONTRACTOR'S "ADDITIONAL RATE". Prices for these "ADDITIONAL RATES" submitted must be based on a continuing run and **must be EXCLUSIVE of all preliminary charges** and will not be a factor in determining award.

Bidder **MUST** submit a price or NC (No Charge) for each line item in Sections 8.1, 8.2.1, 8.2.2, 8.3, and 8.4 on the following page. If an entry of NC is entered it shall be held the bidder intends to furnish those individual items at no charge to the Government.

Transportation charges are **NOT** a factor in determining award.

Bidder must state in the bid, the location (city and state) of the plant(s) from which this product will be shipped. Award will be made to the low responsible offeror whose offer is determined to be fair and reasonable.

8.1 Printing and binding Item (A) 75,000 copies; Item (B) 270,972 copies; Item (C) 555,010 copies; and labeling, addressing, packing, storing, & shipping approx. 15,301 cartons of pamphlets.....

.....\$_____

8.2 Prices for Page Count Changes: The page counts may change from the originally stated page counts at the time the print files are received. The contractor must enter a price below for each possible variation. The appropriate figure listed below in **8.2.1/8.2.2** must include set-up charges and will be used to reduce/increase the purchase order price based on FINAL page counts and FINAL quantities. **These prices are not a factor in award. Although these prices are not a factor in award, the Government reserves the right to reject/renegotiate any prices it deems unreasonable at the time of award.**

8.2.1--- If page counts decrease from originally stated in the specifications, prices submitted below will reduce the original Purchase Order price accordingly.

<u>4 Pg. Decrease, per M:</u>	<u>8 Pg. Decrease, per M:</u>	<u>12 Pg. Decrease, per M:</u>	<u>16 Pg. Decrease, per /M</u>
Item (A): \$_____/M;	\$_____/M;	\$_____/M;	\$_____/M
Item (B): \$_____/M;	\$_____/M;	\$_____/M;	\$_____/M
Item (C): \$_____/M;	\$_____/M;	\$_____/M;	\$_____/M

8.2.2--- If page counts increase from originally stated in the specifications, prices submitted below will increase the original Purchase Order price accordingly.

<u>4 Pg. Increase, per M:</u>	<u>8 Pg. Increase, per M:</u>	<u>12 Pg. Increase, per M:</u>	<u>16 Pg. Increase, per M</u>
Item (A): \$_____/M;	\$_____/M;	\$_____/M;	\$_____/M
Item (B): \$_____/M;	\$_____/M;	\$_____/M;	\$_____/M
Item (C): \$_____/M;	\$_____/M;	\$_____/M;	\$_____/M

8.3 Prices for Quantity Changes: Regardless of final page counts, prices submitted in 8.3 will decrease/increase the original Purchase Order price by the difference between the bid quantity and the final quantity.

"ADD'L RATE"

Printing and Binding Item (A).....per 1, 000 copies... \$_____

Printing and Binding Item (B).....per 1, 000 copies... \$_____

Printing and Binding Item (C).....per 1, 000 copies... \$_____

Initials

8.4 Labeling, addressing, packing, sealing, etc.: Prices submitted in 8.4 will decrease/increase the original Purchase Order price by the difference between the number of approximate cartons stated in the bid quantity and the number of cartons actually utilized based on the final quantity.

A. Item Aper carton.....\$_____

B. Item Bper carton.....\$_____

C. Item Cper ½ carton.....\$_____

D. Item Cper ¼ carton.....\$_____

8.5 Company name, address, contact name and telephone number, and production function of subcontractor(s), if any, who will perform on this contract.

8.6 Location of shipping point/staging area:

City_____ State_____ Zip Code_____.

8.7 Name of Contact person: _____ Phone Number: _____ FAX Number: _____

Email address (required)_____.

8.8 At the same time invoices are submitted to GPO for payment, contractor **MUST** email a copy to Theresa.L.Skyrm@irs.gov.

Bidder must fill out, sign or initial as indicated on pages 12 and 13 of these specifications and return it with the bid.

SUBMIT WRITTEN BIDS TO: U.S. Government Printing Office, Bid Section (PPSB), 36 H Street NW, Room C-161, Washington, DC 20404.

FACSIMILE BIDS are permitted. Submit facsimile bids to FAX No. 202-512-1782, one bid per facsimile. Refer to Solicitation Provisions in GPO Contract Terms (GPO Pub. 310.2), Page 1, Paragraph 6.

Note: With each bid submitted, whether written or facsimile, bidder must provide a duplicate copy.

Name of Firm

Signature of Bidder